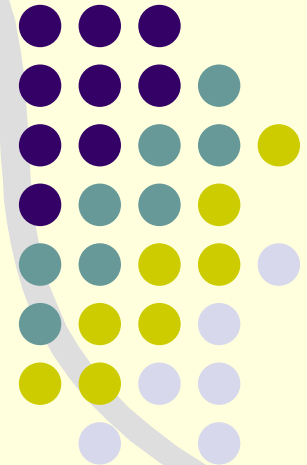
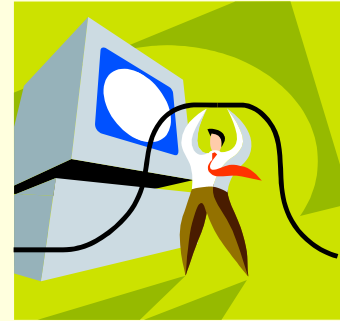
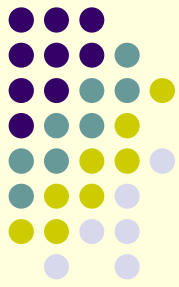


Proposed CSAC Technology Changes

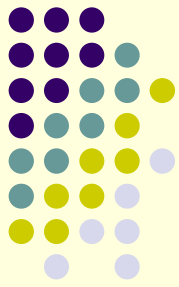


CASFAA Conference
December 2004

Presenters



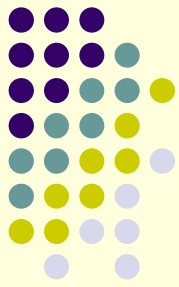
- Sally Atlas
Training Manager
satlas@csac.ca.gov
- Anne Robertson
Grant Operations Manager
aroberts@csac.ca.gov



Today's Agenda

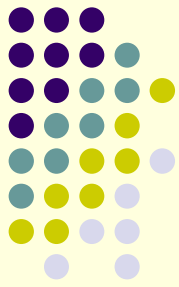
- Grant Delivery System – overview of current technology and enhancements underway
- Proposed Technology Changes – Service Oriented Architecture
 - Real-time Processing
 - Web Services
- Open Discussion – your input and ideas

Grant Delivery System

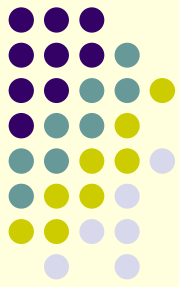


The Grant Delivery System (GDS) is the actual database that houses all of the Cal Grant information and processes grant transactions.

WebGrants



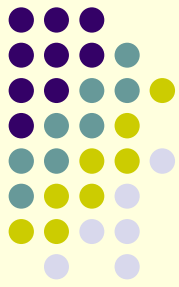
WebGrants is the web-based application that schools use to access Grant Delivery System data and input transactions for processing.



WebGrants for Colleges

- Colleges use WebGrants:
 - To view and update individual student Cal Grant records
 - To update Cost Estimate data
 - To update institution contacts and demographics
 - To process Cal Grant payments
 - To upload and download Cal Grant data to/from GDS

Modifications & Enhancements (because you asked!)



- **Payment Rosters**

- Print Custom Rosters
- Compare Two Payment Rosters
- Upload a file of school changes rather than key individual changes
- Report students as “Not in Attendance”
- EL Verification added

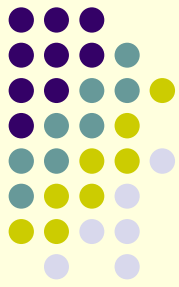
- **New Reports**

- Cumulative GPA Summary Report
- Unclaimed Awards Report

- **Other Changes**

- Enrollment File Upload
- Bi-Monthly Payments to Schools

Modifications & Enhancements (because we had to!)



- **Unique Identifier**

- Replaces SSN on all student correspondence
- Added to all student information screens and to the payment roster screen

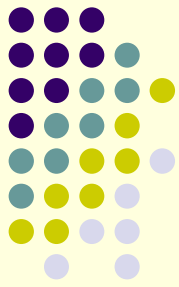
- **Change Passwords**

- WebGrants Passwords must be changed every 90 days for security purposes

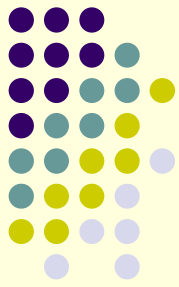
- **Chafee Grant Program**

- Developed online student application
- Added a Need Analysis screens to WebGrants
- Added a student status screen to WebGrants
- Built processing functionality for CSAC staff

Top 10 Enhancements

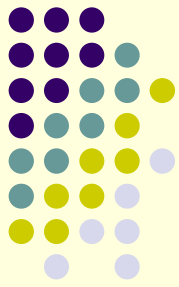


1. Allow Retroactive Corrections to Need and Payment (Delay withdrawals)
2. WebGrants identify ISIR used for award
3. Leave of Absence Simulator
4. Roster data file capability to verify EL
5. Automate APLE



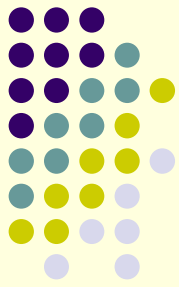
Top 10 Enhancements

6. Student History Enhancement
7. School Preference Screen
8. Roster Data File upload reject report
9. Automate TCP & 5th Year
10. @ and * on weekly Roster data files



Discussion

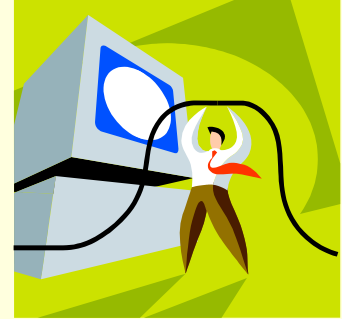
- What do you think about these changes?
- Are we on the right track in meeting your needs?
- Does the priority seem logical?
- What other ideas do you have that should make the “Top 10” list?



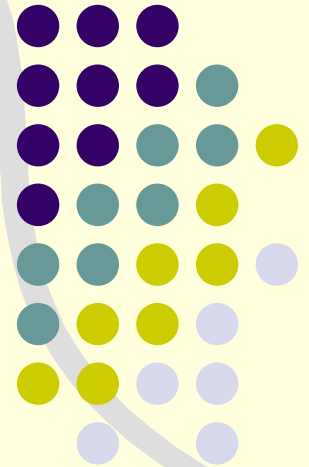
Enhancements for Students

- Postcards for Missing GPAs
- Web application for students
 - Check status of Cal Grant application
 - Report address changes
 - Request school changes
 - Check payment history and renewal eligibility

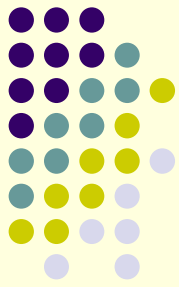
Proposed Technology Changes



Real-time Processing
& Web Services

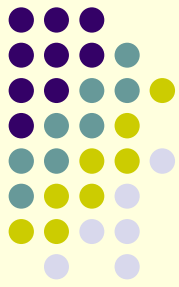


Service Oriented Architecture

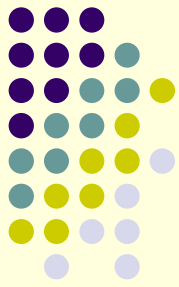


- Feasibility Study Report (FSR) written
- Submitted for consideration in 2005-06 budget

Service Oriented Architecture



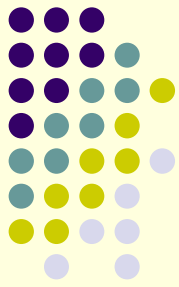
- Real Time data services to institutions, students, high schools and CSAC staff
- Provide an automated, virtual integration between GDS, institutions and high school information systems using Web Services
- Provide students with enhanced direct web access to Cal Grant information and tools
- Provide the Grant component for an integrated Financial Aid Portal for students, schools and other partners.



Objectives of Proposal

- Allow students and parents a better opportunity to determine award eligibility, status and financial aid availability and select school of choice
- Provide better and more flexible services to high schools, institutions and students
- Reduce workload for participating institutions and high schools
- Reduce workload for CSAC staff
- Provide better accounting and budgeting information for the state
- Provide for eventual portal services to students, institutions and partners

Schedule for Implementation



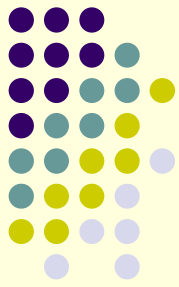
- Two Phases

- Phase 1 – Real Time Database

- Implementation starts July 05 and complete July 06

- Phase 2 – Web Services

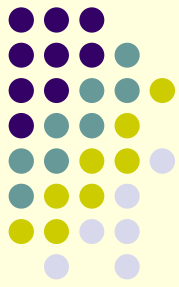
- Requirement gathering starts during phase 1 with user community.
 - Implementation starts July 06 and most initial services complete by July 07
 - Initial payment pilot project for participating schools



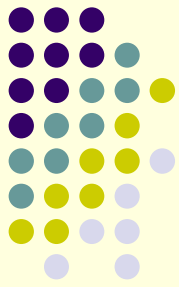
Phase 1 - Real Time Database

- Restructure GDS Database packages and procedures to provide real time posting of transactions and delivery of entitlement awards.
- Provides the basis for automated transactions between systems in Phase 2.

Real Time Database Benefits



- Reduces reconciliation and synchronization workload between FAMS and GDS
- Provides current status to staff and users and provides increased flexibility for schools to avoid the lag time built into the current weekly cycle.
- Continues to support existing systems without requiring them to change
- Provides immediate entitlement award status for students with completed GPA and FASFA.

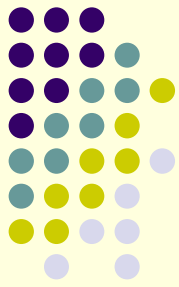


Impact to School Systems

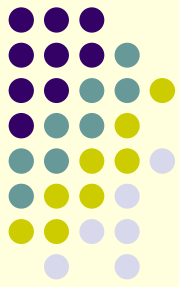
- Minimal impact on schools not able to take advantage of the real time nature of the database.
- Continue to provide existing batch roster upload and download procedures to allow schools to transition as they desire.

Phase 2

Web Services Objectives

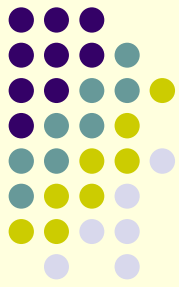


- Provide the capability for automated, secure services between heterogeneous Financial Aid Management Systems, high school student information systems and the Grant Delivery System.
- Provide the capability for composite applications.
- Enhanced student access to real time access to their Financial Aid information.
- Provide a decentralized view of the GDS for Institutions and allow them to select level of participation.



Benefits Web Services

- GDS would be transparent to participating FAMS user.
- One time data entry
- Real time data and status
- Flexible
- Allows for a full services Financial Aid Portal for students

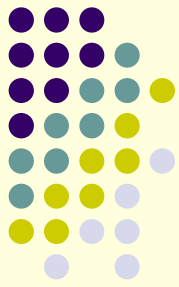


Impact to School Systems

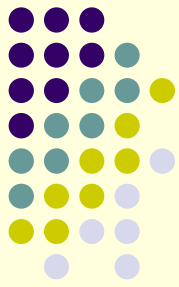
- We will work with major vendors to modify systems to work with GDS.
- All online functions will continue in the real time environment (phase 1).
- Existing batch processes (current file upload and download) will continue to allow schools to transition on their own time table.

Phase 2

Examples Web Services Interfaces

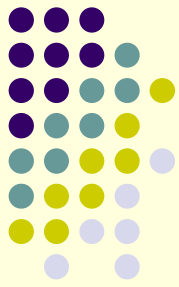


- Award and query information
- GPA query and update
- Payment query and update
- School Change
- Unclaimed awards
- Reconciliation
- Institution demographics query/update
- Student History query
- USDE ISIR load and update
- Funds Disbursement/SCO interface
- Verification updates and results
- Institution Packaging and update
- Unique student Identifier



Discussion

- We'd like to hear your thoughts!
- Do you like the proposal?
- Do you think your campus will use the new technology?
- What issues, if any, do you anticipate?
- Tell us about the implementation of COD – how is XML working for your campus?

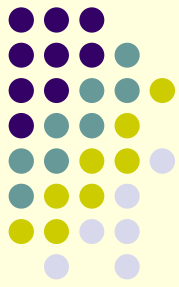


Want to talk tech?

- Call the CSAC Help Desk at 1-888-294-0148 or csachelpdesk@csac.ca.gov
- Or see us after the session and we will give you the contact for our Information Technology Chief, John Bays.

**Thank you for coming today – we
appreciate your comments and
suggestions.**

Current System Complexity



- 29 Different Commercial Institution FAMS

Oracle Financials
PeopleSoft
SAP
SAFERS
DATATEL
PowerFAIDS
ED Express

SCT Banner
Banner 2000
Sigma Systems
SAFE
EDTech
Etc...
At least 62 In-house systems

- 33 Different HS Student Information Systems

Aeries
CIMS
DMS
EADS
Student 3000
Etc...

Zangle

SASI
Digitronics
Pertaine
Powerschool
At least 50 in-house systems

- CSAC, EDFUND, Lenders, Other partners and US Dept Ed